

An Employer's guide to understanding Teachers' Pensions Employer Portal

www.teacherspensions.co.uk

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The Employer Portal can be located on the employer section of the Teachers' Pensions website: www.teacherspensions.co.uk/employers

The screenshot shows the Teachers' Pensions website with the 'Employers' tab selected in the top navigation bar. The main content area features a large graphic with directional arrows pointing to 'EMPLOYER PORTAL', 'CASE STUDIES', 'TPTV', and 'ERM'. To the right is an 'Employer Login' section with 'Sign in' and 'Contact us' buttons, and a link for 'Forgotten your login details?'. Below the login section is a 'Keep up to date' section with a 'Change 2015' badge and a 'Learn more' link. The bottom of the page has a 'Welcome to the Employer Hub' section with a paragraph of text and a link to 'TP Online'.

Public Members **Employers** Stakeholders Log in | Member Registration

Teachers' Pensions

Home Employer Guide Training & Resources Employer FAQs News TP Online Employer Portal

Did you know about all of the employer resources available to you? Teachers' Pensions will always show you which route to take. > Find out more

EMPLOYER PORTAL CASE STUDIES TPTV ERM

Employer Login Please log in below: Sign in Contact us Forgotten your login details?

Keep up to date Change 2015 > Learn more

Welcome to the Employer Hub

If you're an employer of teachers or lecturers then you're in the right place. This is the Employer Hub. It's where you'll find everything you need to run The Teachers' Pension Scheme effectively. You'll find quick links to detailed support and advice, News articles to keep you up to speed with the latest changes. Plus all the training you need to maintain and update your pension administration skills.

Looking for TP Online? You can now visit TP Online for barred list functionality only at www.tponline.co.uk or download the application form.

Introduction to the Employer Portal

The Employer Portal has been developed as a means of securely exchanging data about pension scheme members between Teachers' Pensions and data holders (e.g. employers, payroll/HR providers). It also provides the facility for online applications from members to be administered.

Each user is given a unique account with access to the secure area and is unable to access any other user's account. Passwords **must not** be shared with colleagues. When a staff member no longer requires access to the Employer Portal, it's the employer's responsibility to inform Teachers' Pensions immediately. New login details should be requested for any replacement.

Multiple access accounts are available to data holders who administer more than one establishment. To obtain a multiple access account, please complete a delegation form.

How to register

Before data can be sent, the data holder is required to register to use the Portal, following which Teachers' Pensions issue confidential password and PIN details.

To register please complete and return our delegation form.

Requests to register should be emailed to epregistrations@teacherspensions.co.uk.

Keeping things simple

In the case of large data holders where multiple access is required, that data holder may wish to create a global email address for web form notifications to be issued.

This has the advantage of providing a central contact point which multiple users within the company can be given permission to access, thereby removing the problem of work remaining untouched if the owner of a single name personal email address is absent from work.

Should you wish to operate in this way please confirm the global email address and contact details to epregistrations@teacherspensions.co.uk

Having subscribed to the Employer Portal it's good practice to access your account each day to check for incoming information/applications from TP or, teaching staff employed by you.

How to Log in

1. Open web browser and go to <https://www.teacherspensions.co.uk/employers>
2. Click on 'Sign In' and enter your log in name (email address), then click on 'Next'
3. Enter the appropriate characters from your password as requested and also the appropriate numbers from your PIN as requested, then click on 'Log In'
4. You'll be presented with a confirmation pop up, click on 'OK'.
5. You're now successfully logged into the Employer Portal.

When you login for the first time you'll be forced to change your password and PIN. Please follow the on screen instructions.

How to change your account details

To change all of your account details (password/PIN/security question) click 'Change Account Details' from the 'Useful links' menu.

If you are locked out of your account, you can use our unlock form to reactivate your account or our password/pin reset tool to obtain new login details.

The Dashboard

The dashboard is your central hub to easily administer your Teachers' Pensions responsibilities. The dashboard is divided into a number of sections:

1 Side navigation

The side navigation bar is your quick access list to those features you'll be using every day. The links are self explanatory but here's a quick overview:

- Overview - links back to the dashboard summary page
- Task Manager - links to our tool to manage member web forms
- My Messages - view your Employer Portal inbox
- Upload a file - send a file to Teachers' Pensions
- Download a file - access the files you need from Teachers' Pensions
- Member Search - amend teachers' information and obtain member prints

2 My messages

We'll provide important messages on the system status and new information from relating to the Teachers' Pensions website. The dashboard preview will show a selection of the most recent unread messages.

To view 'all messages', simply click the 'view more messages' link.

3 Task Manager

This provides a snapshot of two part application forms that members have submitted online for our attention. 'Awaiting input' shows the number needing your input, 'Complete' shows finished applications that have been sent to Teachers' Pensions and 'Manually Finished' lists the forms Teachers' Pensions have completed.

4 Latest News

As new articles are published this feed will provide the latest employer news, helping you to keep up to date with the Teachers' Pension scheme.

5 Get in touch

If you have a query and would like to contact us, you can find all the relevant information on the right of the page under the "Get in touch" heading. Various employer surveys are also available for you to provide your feedback and help us improve our user experience.

6 Useful Links

Here you will find the account management tools mentioned previously, if you ever need to amend your log in credentials or amend your security questions please use the tools provided in this section. You will also find a copy of the terms and conditions and the latest version of the "Employer Portal Guide".

You may notice additional promotional content on the right of the Employer Dashboard depending on the current campaign activity.

The screenshot displays the Teachers' Pensions Employer Dashboard. At the top left is the Teachers' Pensions logo. A navigation bar includes links for Home, Employer Guide, Training & Resources, Employer FAQs, News, and Employer Portal. A search bar is located at the top right. On the left, a sidebar menu lists: Overview (1), Task manager, My messages, Upload a file (STU), Download a file (STU), Member Search, and Data Centre Settings (STU). The main content area is titled 'Employer Dashboard' and is divided into three sections: 'My messages (1)' (2) containing a welcome message dated 15 Oct and a link to view more messages; 'Task manager' (3) showing 57 tasks awaiting input and a link to view more tasks; and 'Latest News' (4) featuring a list of recent updates and announcements. On the right side, there are two sections: 'Get in touch' (5) with links for Employer Contact Us, EOYC Underpayment, and Employer feedback; and 'Useful Links' (6) with links for Change password, Change PIN, Change security question, View terms and conditions, and Employer Portal Guide. A footer at the bottom contains links for Contact Us, Glossary, Legal, Site Map, Related Links, and Department for Education.

How to download files

In order for transactions to be successfully completed in the Employer Portal a two stage process needs to be completed. The first stage is to 'download' the appropriate template to your computer into which you'll enter the data; you can then 'upload' the completed data into the Employer Portal. These processes are explained in this section and 'How to upload files' section.

How to download: Service update (TR6, TR8, TR28) or Error Files

1. To download templates such as TR6, TR8, TR28 click on 'Download a file' (STU) on the left hand side navigation bar, select templates. Appointment statements, Error Files, and much more, can be found in the categories list on the 'Download a file (STU)' page.
2. Click on the appropriate document that you wish to download. Then click on 'Save' when the message box appears this will save the document to your computer - take note of where you save the document (e.g. My Documents).

IMPORTANT

Do not rename any of the Teachers' Pensions templates as this will result in errors when attempting to upload and process the information.

The screenshot displays the Teachers' Pensions Employer Portal interface. At the top, the logo 'Teachers' Pensions' is visible on the left, and a search bar is on the right. Below the logo is a navigation menu with links: Home, Employer Guide, Training & Resources, Employer FAQs, News, and Employer Portal. The left sidebar contains a list of options: Overview, Task manager, My messages, Upload a file (STU), Download a file (STU), Templates (highlighted with a green bar), Member Search, and Data Centre Settings (STU). The main content area is titled 'Templates' and lists 'Templates available to download:' with a bulleted list: AE Staging Date Template, Auto Enrolment Template, Contributions Monthly Breakdown, Member Email Template, Member Print Template, Annual Return Template (40000 rows), Annual Return Template (20000 rows), Sage Service Template, TR28 - Missing Service Template, TR6 - Appointments Template, TR8 - Leavers Template, and Change of Teachers Details Template - this function now resides in Member Search. At the bottom of the main content area, it says 'Last Updated: 01/10/2014 13:08'. The footer contains links: Contact Us, Glossary, Legal, Site Map, Related Links, and Department for Education.

How to download: Annual Return Data File

1. To download the Annual Return Template, click on 'Download a file (STU)' from the left hand side navigation bar, select templates.
To download the Annual Return Schedprint, click on 'Download a file (STU)' from the left hand side navigation bar, select Annual Return from the categories list.
2. Click on the appropriate file (e.g. SCHEDPRINT0000000) then click on 'Save' when the message box appears.
3. Save the data file to your PC, using the following dialogue box, please take note of where you're saving the file.

IMPORTANT

Do not rename any of the Teachers' Pensions templates as this will result in errors when attempting to upload and process the information.

4. If you're using an excel spreadsheet, open the saved file and input the data. Once the Annual Return has been processed and all the information is complete, you can then upload the completed file back onto the system.

Overview

Task manager

My messages

Upload a file (STU)

Download a file (STU)

> Templates

Member Search

Data Centre Settings (STU)

Download a file (STU)

Establishment(s):

You have been given access to multiple Data Centres. You can amend your default Data Centre at any time on the settings page, [here](#).

Please select the Data Centre you are interested in from the drop down list below:

TP

Switch


Categories:

There are multiple sections within this Data Centre. Please select the section you are interested in from the drop down list below:

Default

Switch

Files Available for Download:

Filename	Description	Available Since	Number of Downloads	Last Download
 Contributions Monthly Breakdown 2014 v1.0.xls.XLS	Contributions Monthly Breakdown 2014	16 Apr 2014	3	04 Jun 2014

How to upload files

Here we take a quick walk through the steps you need to follow when uploading a file. There are two key rules to uploading template files (other files can also be sent):

- Only use the templates currently held on the system to send information to us
- Save the files in a CSV format

In order to successfully upload a file, the file must meet the following criteria:-

- File has been successfully converted to .csv format using the relevant template
- File name does not contain (1) or similar
- File has not been renamed by the user
- The user has entered a description on the upload page (can't contain symbols)
- The user has selected the correct LEA/Establishment number on the upload page
- The user has checked the box to agree to the Terms and Conditions on the upload page

If files are uploaded in an incorrect format, these can't be processed.

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Overview
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My messages
Upload a file (STU)
Download a file (STU)
Member Search
Data Centre Settings (STU)

Upload a file (STU)

This area of our Secure Transfer Utility is for sending files from your own computer to Teachers' Pensions on behalf of TP

Data Centres:

You have been given access to multiple Data Centres. You can amend your default Data Centre at any time on the settings page, [here](#).

Please select the Data Centre you are interested in from the drop down list below:

TP ▼

Switch

Upload New File:

To upload a file click on the browse button and select the required file

Description:

Browse

Upload

Once a file has been selected, then to upload it, click the upload button.

You are advised not to attempt to upload files in excess of 10,000,000 bytes (approximately 9,766 kb or 9.5 Mb) in size, and instead to split large files and upload them separately. You can check the size of your file before uploading it by 'right-clicking' on your file and selecting the "Properties" option.

Uploading a file

- To upload a completed TR6, TR8, Service Update, Annual Return or Error File, click on 'Upload a file (STU)'
- Input a description for the file to be uploaded then click on browse to search for the desired file. If you're uploading an Annual Return the file name should be SCHEDPRINT00000000. Note: if you're uploading a TR6, TR8 or Service Update the file name must start with 'TR6', 'TR8' or 'TR28' and not contain commas
- Select the appropriate file and click on 'Open', this will then populate the 'Upload File' field on the previous page. Now click on 'Upload' this will then send the file to Teachers' Pensions
- Once a file is uploaded you'll receive a confirmation email. The email will note if the file upload has been successful or not. If the file you uploaded contains errors, an error file is produced for you to download called either, 'APPTERRS...', 'LVERRS...' or 'SERVERRS...'
- The errors can be accessed via 'Download a file (STU)' (see 'How to download files')
- Once the error file has been downloaded, open the spreadsheet. Noted within the end column is an explanation why the record has been rejected for guidance
- When all corrections have been made to the error file, save the document as .CSV format and re-upload the file.

Task Manager

The task manager is the new tool to make managing the authorisation and tracking of web forms easier. You'll be able to manage authorisations for:

- Retirement applications
- Additional pensions applications
- Certificates of Re-employment
- Opt out applications

The tool allows easy management of web forms by using a selection of filters, which consist of:

- Task name: allows filtering by form type
- Status: needed action or actioned
- Employer filter: allows a per establishment view
- TP reference: search for a specific members forms.

In addition to the filters all forms can be sorted by updated date and submission date.

To view extra details on a form click the 'details' button which will show a drop down of additional information. To jump straight into a form simply click anywhere within its line.

If files are uploaded in an incorrect format, these can't be processed.

The screenshot shows the Teachers' Pensions website with the 'Task manager' section active. The left sidebar contains links: Overview, Task manager (selected), My messages, Upload a file (STU), Download a file (STU), Member Search, and Data Centre Settings (STU). The main content area is titled 'Task manager' and features four filters: 'Filter By Task Name' (set to 'All'), 'Filter By Status' (set to 'Awaiting Input'), 'Filter By Establishment' (set to 'All'), and 'Filter By TP Reference' (empty). Below the filters are 'Filter' and 'Reset' buttons. A table displays one task: 'Retirement Application' submitted on '13 Oct 2014' and updated on '13 Oct'. The table has columns for Status, Submitted, Task Name, TP Ref, Updated, and Establishment. Below the table, there are labels for 'Date Due:', 'Status:', 'Surname:', 'Nino:', and 'Task Code:', with corresponding input fields.

Status	Submitted	Task Name	TP Ref	Updated	Establishment
	13 Oct 2014	Retirement Application		13 Oct	

Details

Date Due: _____ Surname: _____
Status: _____ Nino: _____
Task Code: _____

Member Search

Searching

Member search makes it easy for you to look up personal, address and contact details of teachers to help you carry out your duties.

Results

Once a search is submitted a list of records matching the search criteria is returned. This will provide the following information:

- 1 Registered for MPO
- 2 Surname
- 3 Initials
- 4 Teachers' Pensions Reference Number
- 5 National Insurance Number
- 6 Date of Birth
- 7 You can view further information by using the magnifying glass on the left.
- 8 The member print facility can also be found on the left allowing you to print the record.

The screenshot shows the Teachers' Pensions website interface. At the top is the logo and a search bar. Below is a navigation menu with links: Home, Employer Guide, Training & Resources, Employer FAQs, News, and Employer Portal. On the left is a sidebar menu with links: Overview, Task manager, My messages, Upload a file (STU), Download a file (STU), Member Search (highlighted), and STU Data Centre Settings. The main content area is titled 'Member Search' and contains a search form with fields for NI Number, TP Reference Number (filled with '9999'), Surname, Date of Birth, Initials, Forename, and Gender (set to 'Male'). A 'Find Member' button is below the form. Below the form is a 'Results' section showing '1 record found.' and a table with columns: Actions, Surname, Initials, Teachers Pensions Reference Number, National Insurance Number, and Date of Birth. The table contains one row for a member named 'Redwood' with initials 'R V' and reference number '99/99'. Numbered callouts (1-8) are placed over the interface: 1 points to the 'Registered for MPO' checkbox in the table; 2 points to the 'Surname' column header; 3 points to the 'Initials' column header; 4 points to the 'Teachers Pensions Reference Number' column header; 5 points to the 'National Insurance Number' column header; 6 points to the 'Date of Birth' column header; 7 points to the magnifying glass icon in the 'Actions' column; 8 points to the printer icon in the 'Actions' column.

Actions	Surname	Initials	Teachers Pensions Reference Number	National Insurance Number	Date of Birth
	Redwood	R V	99/99		

Member details

Once you've selected an individual, the following information (if available) will be shown:

- Teachers' Pensions Reference Number
- National Insurance Number
- Title
- First Name(s) / Surname
- Previous Surname(s)
- Gender
- Date of Birth
- Marital Status
- Normal Pension Age
- Address
- E-mail/Mobile/Telephone

The screenshot shows the Teachers' Pensions Employer Portal interface. At the top, there is a search bar and a navigation menu with links: Home, Employer Guide, Training & Resources, Employer FAQs, News, and Employer Portal. On the left, a sidebar menu lists: Overview, Task manager, Upload a file (STU), Download a file (STU), Member Search (expanded), Member Details (selected), Change Member Details, and STU Data Centre Settings. The main content area is titled 'Member Details' and shows 'Showing details for 9999' with a link to 'Update all Details'. Below this, the 'Personal Details' section is displayed with an 'edit' link. The details listed are: Teachers' Pension reference number: 9999, National Insurance Number, Title: Mr, Surname: Redwoof, Previous Surname(s), First name(s): Roar Violet, Gender: Male, Date of Birth, Marital Status, and Normal Pension Age: 59. At the bottom, the 'Address Details' section is visible with an 'edit' link.

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Overview
Task manager
Upload a file (STU)
Download a file (STU)
Member Search
 > Member Details
 > Change Member Details
STU Data Centre Settings

Member Details

Showing details for 9999 [Update all Details](#)

Personal Details [edit](#)

Teachers' Pension reference number: 9999
National Insurance Number:
Title: Mr
Surname: Redwoof
Previous Surname(s):
First name(s): Roar Violet
Gender: Male
Date of Birth:
Marital Status:
Normal Pension Age: 59

Address Details [edit](#)

Access levels

There are three basic access levels to the Employer Portal which are assigned or delegated depending on your needs.

Full Access

This grants access to web form authorisation, file upload and download as well as the dashboard and messages.

Web form only access

As the name suggests this grants access only to web form authorisation, the dashboard and messages.

File upload/download only access

In contrast to the above, this grants access only to file upload/download, the dashboard and messages.

Multiple account access

If you manage multiple establishments and would prefer to have a single login to manage them all please e-mail epregistrations@teacherspensions.co.uk.

File submission errors

Sometimes file submissions don't go as smoothly as we'd like. Thankfully most errors are easy to correct and resubmitting a file is no different to a standard file upload. Follow the simple steps below:

1. If there is a problem with the information submitted via the TR6, TR8 or service update template, an error file is produced for you to download called 'APPTERRS...', 'LVERRS...' or 'SERVERRS.... You'll receive an email noting which file has produced the errors.
2. You'll need to download the error file and amend the incorrect data. The error files can be accessed via 'Download a file (STU)'.
3. Once the file has been downloaded you'll need to amend the data accordingly, below is a table containing possible errors and what action is required:

Message on error file	Explanation
Unable to process automatically - corrective action being taken by Teachers' Pensions	The information is already on file or corrective action is required by Teachers' Pensions - no further action is required by you, the employer.
Part-time salary too high/part-time salary excessive	When calculating the days worked in the period using the Annual Salary and Part-time Salary Paid the result is +days. The part-time salary figure shown should be revised. It's possibly the annual part-time salary and not the actual earnings in the period you have input.
Service spans an opting/part-time election date or 31/3	Service being input spans the date of an event or the financial year end. The service line should therefore be split at the date of the opting/part-time elections and at 31 March every year.
Establishment number not on our database	The school number recorded on the line of service is not recognised by our database. If this is correct please contact us on 0345 3003756 (option 4) so that we can update our records.
No matching record on database	We are unable to identify this teacher on our records with the information provided. Therefore check the TEACHERS' PENSIONS reference, NI Number, Name, DOB.
Mismatch of personal data	One or more of the personal details don't match the data currently held by TEACHERS' PENSIONS. If the information you've supplied is correct, please leave on the error file and notify Teachers' Pensions with the correct details using the 'Member Search' function on the Employer Portal.

FAQs / Contact us

We have tried to cover all the key areas of using the Employer Portal in this guide but appreciate you may have more questions. This section covers the most common queries we get, if your question isn't answered here, we have the information to direct you to where it can be.

Why can I not access the Employer Portal?

- Your login details are incorrect. You can reset these using the 'reset password/reset PIN'.

How do I change my Password/PIN/Security question?

- Once you're logged in you can change your account details under the 'Useful Links' section on the right.

Why has my account been locked?

- You've entered your details incorrectly more than five times; you'll need to use the account unlock form, [here](#).

What does DOT mean on the TR6 template?

- The DOT (Description of Teacher) column on the TR6 template is the Salary Scale. All salary scale codes for Teachers Pensions can be found [here](#).

Can I enter more than one teacher on the TR6, TR8 and Service Update templates?

- Yes, you can upload multiple teachers on one template, however please ensure that the Teacher Reference, NI number, Surname, Initial and D.O.B. are completed on each row.

How do I note concurrent service on the TR8 and Service Update templates?

- **For Local Authorities.**
If a member has more than one contract and is employed with more than one establishment within the Local Authority, separate service lines of service can be sent for each establishment. Teachers' Pensions will amalgamate the service details and record as concurrent. However, if a teacher is employed on two separate contracts for the same establishment the service will need to be amalgamated and recorded as concurrent, using code 0953.
- **For non-Local Authorities.**
If a member has more than one contract with the same employer but is not employed under the local authority, then all service lines need to be amalgamated into one service line using the concurrent service calculator/rules.

Do I have to password protect the files I upload to the Employer Portal?

- No, as the Employer Portal is already secure you don't need to password protect or encrypt the uploaded files.

Is there a file size limit for uploaded files?

- Yes, any file you upload to the Employer Portal must be no larger than 10mb.

I have uploaded a TR6/TR8/Service Update; however it has not been processed automatically, why?

This can be for a number of reasons:

- You have uploaded your own spreadsheet and not used the templates provided
- The uploaded file must be generated from the downloaded templates by using the 'click here to save as CSV' function
- The file must be in '.csv' format. - '.xls' format will not be processed automatically, therefore you must use the templates provided
- Ensure the file name is in the correct format
- No brackets are allowed in the filename.

I have received an email confirming there are forms to authorise but can't find them in the Employer Portal?

- All electronic forms submitted by an employee can be found under 'Task Manager' on the left hand side navigation. Once they've been authorised the form will be marked complete on the list and forwarded to Teachers' Pensions automatically.

What web browser can I use to access the Employer Portal?

While Teachers' Pensions may work for other browsers, we encourage using the latest version of the below:

- Internet Explorer (for Windows)
 - Minimum Internet Explorer 7
 - Recommended Internet Explorer 8 or Above
- Firefox (for Windows, Mac, and Linux)
 - Minimum 4.0.x, 3.6.x, 3.5.x, 3.0.x
 - Recommended Latest version
- Safari (for Mac and Windows)
 - Minimum 5.x, 4.x, 3.x
 - Recommended Latest version
- Google Chrome (for Windows and Mac)
 - Minimum Latest version
- Opera (for Windows and Mac)
 - Minimum 10.x, 9.6.x, 9.5.x
 - Recommended Latest version

No matter what browser you use, you will need to ensure the following are enabled;

- Cookies
- JavaScript
- SSL

View our maintenance pages to be kept up to date with upcoming developments and site downtime, [here](#).

Question not listed?

If you have a query not listed above or any other comments for feedback drop us an email or give us a call on the details below:

E-mail: epregistrations@teacherspensions.co.uk

Telephone: 0345 3003756 (option 4).



For more information on Teachers' Pensions

Visit us at www.teacherspensions.co.uk | Call us on 0345 300 3756

Monday - Friday 8:30am - 6pm

Write to us at Teachers' Pensions, 11b Lingfield Point,
Darlington, DL1 1AX